ESD Procurement Business Practice DOs and DON'Ts

END USERS (Requesters) DOs and DON'Ts

Do: Get a quote number form the vendor if possible

Do: Check the restricted list and mark on the order

Do: Know if your approver is available to approve the order. If he or she is on travel or vacation, and let your inputter know.

Do: Think about shipping costs if more than 20% is anticipated (i.e. Foreign shipping & custom charges).

Don't: put down next day unless it really is a rush

Don't: **call the vendor directly to make any changes to the order**. DOE/LBNL policies and procedures consider this part of an unauthorized purchase. The buyer must make all changes to the order. (We can do a conference call if necessary to work out any problems).

***Don't: call in a service repair or ship a part for repair or modification until you contact the original buyer so a determination can be make if you will need to generate a requisition. The buyer will type the shipping document (**which is ALWAYS required**), confirm the repair or service, and make payment arrangements with the vendor. It is important that the end user, buyer, and vendor be kept in all phases of the repair or service to avoid it becoming an unauthorized procurement.

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APPROVERS DOs and DON'Ts

Do: Let your requesters know if you will not be available to approve orders.

Do: check your e-mail regularly for orders

Do: know who your designated inputter is and who their backup is in case they are out.

Do: know when your inputter is on vacation or will be out of the office for an extended period of time

Do: Call Procurement (x7774) if you have any questions on policies or procedures

***Do: ask your inputter if you need to know who the buyer is or if you have a question regarding your order.

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INPUTTERS DOs and DON'Ts

Do: make sure you check the e-mail & change the delivery address from the default (in ePRO) if it is different.

Do: make sure there is a Shipping & Changes line for orders under $4,000

Do: make sure End Users have checked the restricted list. This will help determine how you enter the order into PRP/ePRO

Do: put the vendor name & phone number in comments request.